

Washington State Transportation Commission

Ferry Riders Opinion Group (FROG) Survey Panel

January 2019 WSF Policy Study

Final Presentation



Methodology



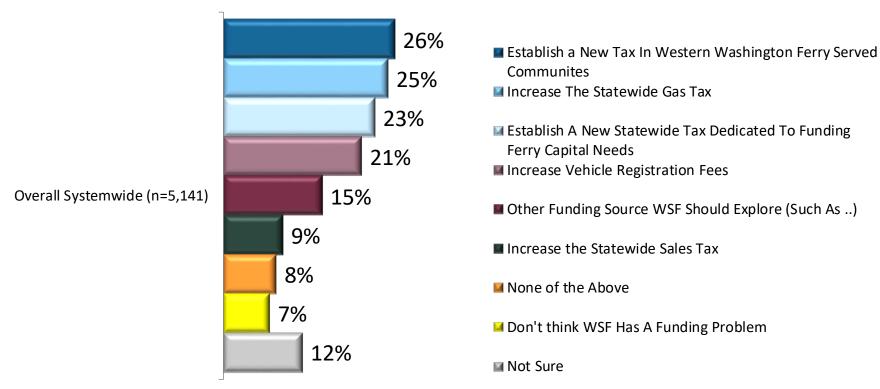
- Online Survey of Washington State Ferry Riders Opinion Group (FROG) survey panel.
- A total of 5,141 surveys were completed in January 2019 (January 12 January 28, 2019) with riders that had taken a WSF in the last 12 months.
- Data was weighted by route according to the June 2018 WSF traffic report, based on the last trip taken.
- Total & sub-group sample sizes and definitions:

	Sample	Graph Name	Definition
•	5,141	Total	Total number of completed surveys system-wide
•	1,300	Vehicle Only	Riders who only boarded the ferry in a vehicle in last 12 months
•	3,704	Multi-modal	Riders who boarded by both vehicle and another mode in last 12 months
•	3,681	Walk-on	Riders who boarded on foot in last 12 months
•	450	Bike-on	Riders who boarded a ferry by bicycle in last 12 months
•	429	Transit	Riders who boarded via transit / bus / shuttle in last 12 months
•	291	Motorcycle	Riders who boarded via motorcycle in the last 12 months
•	91	Registered Carpool	Riders who boarded in a registered van / car pool in last 12 months
•	967	Do train / Bus	Riders who already do a train / bus in combination with the ferries
•	1,571	Might do train / bus	Riders who feel the could / might do train / bus and ferries
•	4,792	Vehicle Drivers	Boarded ferry as vehicle drivers in last 12 months
•	3,525	Vehicle Passengers	Boarded ferry as vehicle passenger in last 12 months



When asked to recommend a funding source for long-term capital needs, "establishing a new tax in Western WA ferry served communities" and "increase the statewide gas tax" received the most mentions. They are followed by "establish a new statewide tax dedicated to funding ferry capital needs" and "increase vehicle registration fees." Seven percent (7%) do not feel WSF has a funding problem and 12% are not sure.

Funding Source Recommended to be Explored



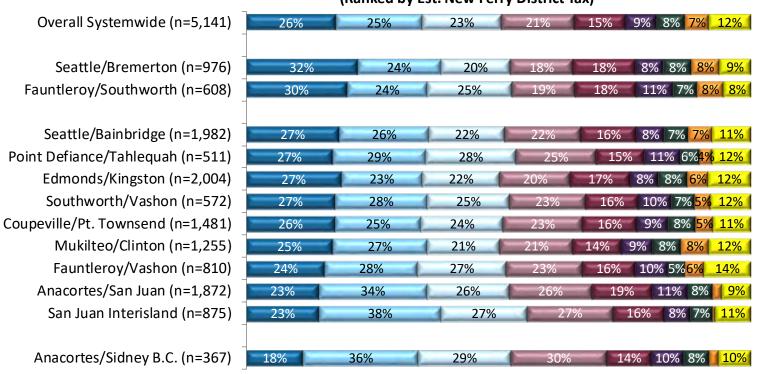
Q4 Current ferry fares <u>fund about 70-75% of ferry operations and maintenance</u> of vessels and terminals but <u>do not provide for long-term capital improvements or replacement</u> (these could include non-operational items like new vessels, terminals, parking structure, etc.).

Which of the following increases in funding sources, if any, would you <u>recommend be explored and possibly considered to fund the long-term capital needs</u> of the ferry system? (Please check as many as you would like to see used)

Establishing a new tax in Western WA ferry served communities tends to be mentioned more often by Seattle/Bremerton as well as Fauntleroy/Southworth riders and least often by Anacortes/Sidney B.C. riders.

Funding Source Recommended to be Explored

(Ranked by Est. New Ferry District Tax)



- Establish a New Tax In

 Western Washington Ferry
 Served Communites
- Increase The Statewide Gas
- Establish A New Statewide Tax Dedicated To Funding Ferry Capital Needs
- Incréase Vehicle Registration Fees
- Other Funding Source WSF Should Explore (Such as ..)
- Increase the Statewide Sales
 Tax
- None of the Above
- Don't think WSF Has A Funding Problem
- Not Sure

NOTE: Bars shown without % numbers are 4% or less

Q4 Current ferry fares <u>fund about 70-75% of ferry operations and maintenance</u> of vessels and terminals but <u>do not provide for long-term capital improvements or replacement</u> (these could include non-operational items like new vessels, terminals, parking structure, etc.).

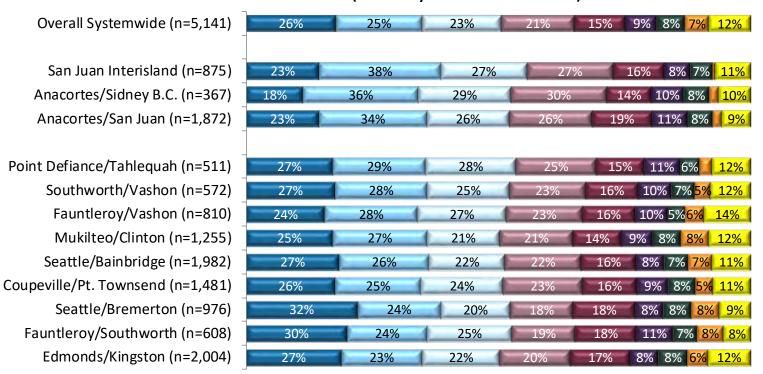
Which of the following increases in funding sources, if any, would you <u>recommend be explored and possibly considered to fund the long-term capital needs</u> of the ferry system? (Please check as many as you would like to see used)



Increasing the statewide gas tax tends to be mentioned more often by the San Juan routes.



(Ranked by Inc. Statewide Gas Tax)



- Establish a New Tax In
 Western Washington Ferry
 Served Communites
 Increase The Statewide Gas
- Increase The Statewide Gas Tax
- Establish A New Statewide Tax Dedicated To Funding Ferry Capital Needs
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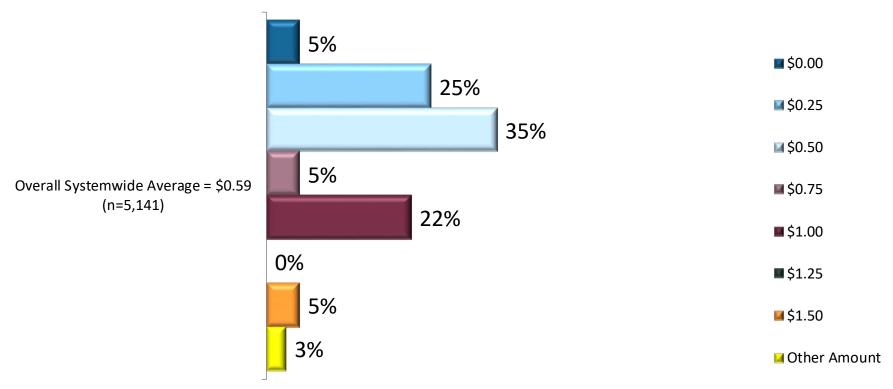
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Q4 Current ferry fares <u>fund about 70-75% of ferry operations and maintenance</u> of vessels and terminals but <u>do not provide for long-term capital improvements or replacement</u> (these could include non-operational items like new vessels, terminals, parking structure, etc.).

Which of the following increases in funding sources, if any, would you <u>recommend be explored and possibly considered to fund the long-term capital needs</u> of the ferry system? (Please check as many as you would like to see used)

Riders on average said \$0.59 when asked how much more they would be willing to pay, provided the funds continue to be dedicated to new ferries. Five percent said zero while five percent said \$1.50 with twenty-two percent saying \$1.00. The largest group said fifty cents.

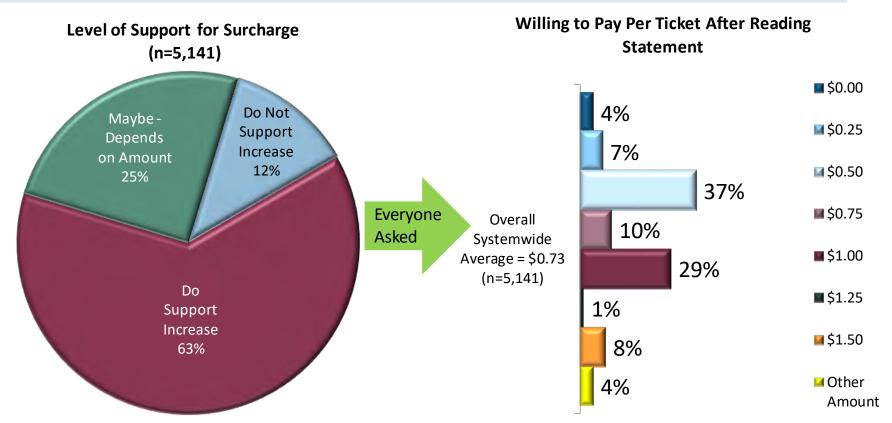
Willing to Pay Per Ticket If Dedicated to New Ferries



Q5 Currently a surcharge of \$0.25 per ticket is dedicated to help fund new ferries. How much more would you be willing to pay, provided this funding continues to be <u>dedicated to new ferries</u>?

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Six in ten (63%) support increasing the surcharge when given a short description of what the \$0.25 raises plus what the cost of a new 144-car ferry is. In contrast 12% said no and 25% said it depended on the amount of the surcharge. This time when given the same surcharge fee points, the average increased to \$0.73 from the pre-description \$0.59 average. Most notable, the \$0.00 and \$0.25 levels dropped while all other amounts increased from their pre-statement figures.



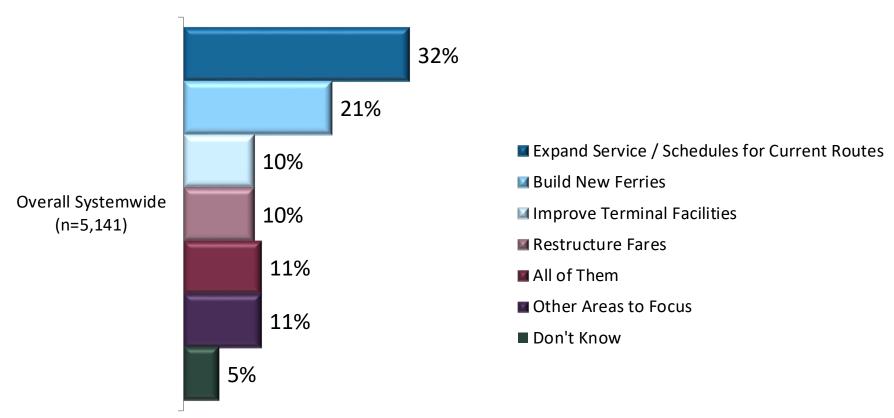
Q6a At \$.025 per ticket the surcharge will raise about \$4 million per year. The cost of a new 144-car ferry costs about \$150 million.

Knowing this, would you support the surcharge of \$0.25 per ticket being increased if it continues to be dedicated to new ferries? Q6b Up to what amount could you support the surcharge being increased to?



A total of 5,141 WSF riders were asked which of four issues/projects they felt WSF should focus on to improve its service. One in three (32%) said expandservice / schedules for current routes followed by build new ferries (21%). Improve terminal facilities and restructure fares were cited by one in ten as were the responses of focusing on all of them and other suggested areas to focus on.

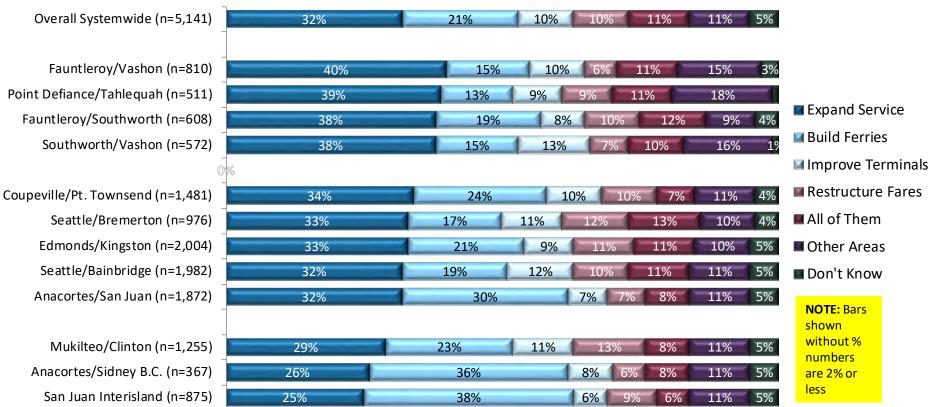
Four General Areas WSF Should Concentrate On – Systemwide



When sorted by the expand service option, the four Vashon routes (40% to 38%) exceed the systemwide average of 32%. Least likely to mention expand service is Anacortes/Sidney B.C. (26%) and San Juan Interisland (25%) with the balance of the routes being about average (34% to 29%).

Four General Areas WSF Should Concentrate On – By Route

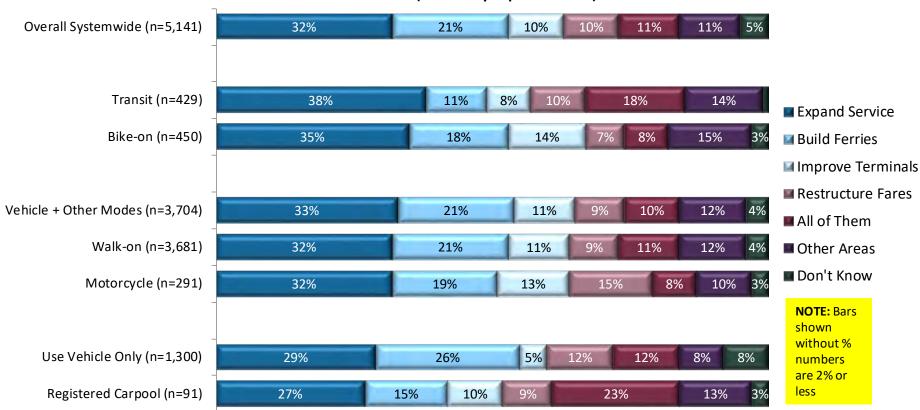
(Ranked by Expand Service)



When the results are broken out by the mode riders have used in the last 12 months, the data finds transit riders (38%) and bike-on riders (35%) want expanded service more than average (32%) and more than those that only drive onto a ferry in a vehicle (29%) or registered carpool (27%).

Four General Areas WSF Should Concentrate On – By Mode

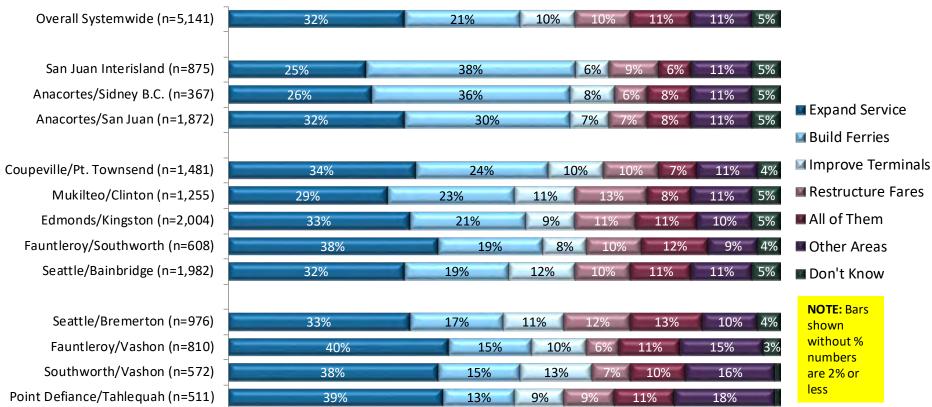




When sorted by the build ferries option, the San Juan routes (38% to 30%) exceed the systemwide average of 21%. Least likely to mention build ferries is the three direct Vashon routes (15% to 13%) with the balance of the routes being about average (24% to 17%).

Four General Areas WSF Should Concentrate On – By Route

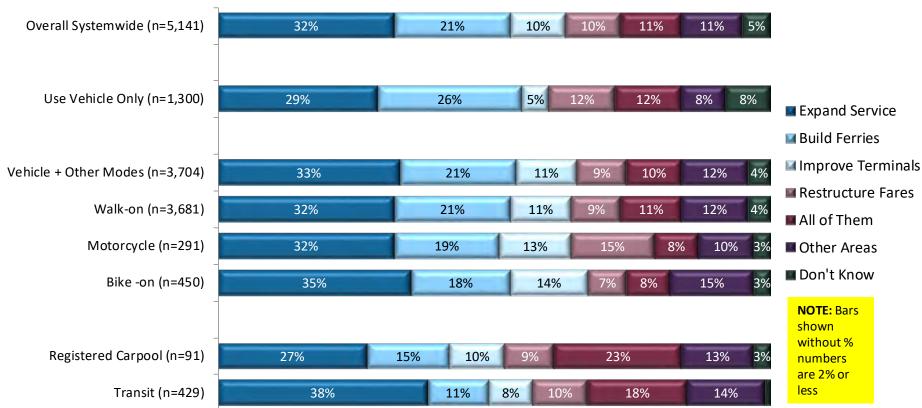
(Ranked by Build Ferries)



When the results are broken out by the mode riders have used in the last 12 months, the data finds those that only people that drive on in a vehicle (26%) want the build ferries option slightly more than average (21%). In comparison, transit riders (11%) were least likely to cite this option.

Four General Areas WSF Should Concentrate On – By Mode



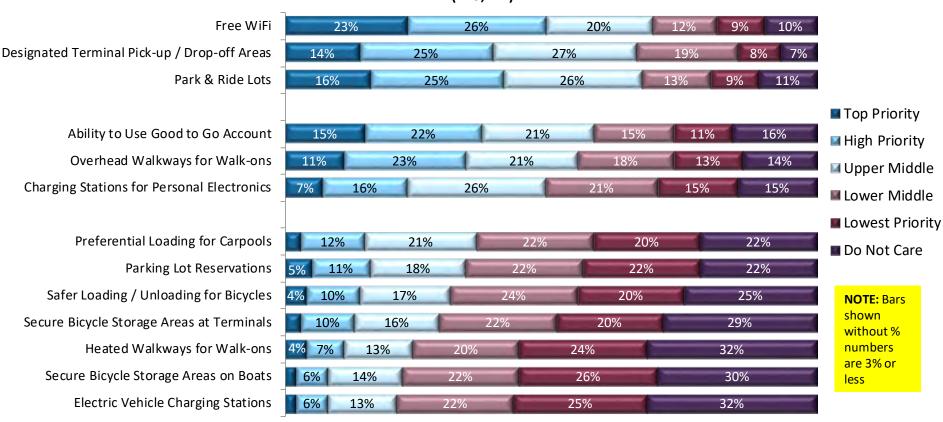




Potential Amenities Desired From List of 13

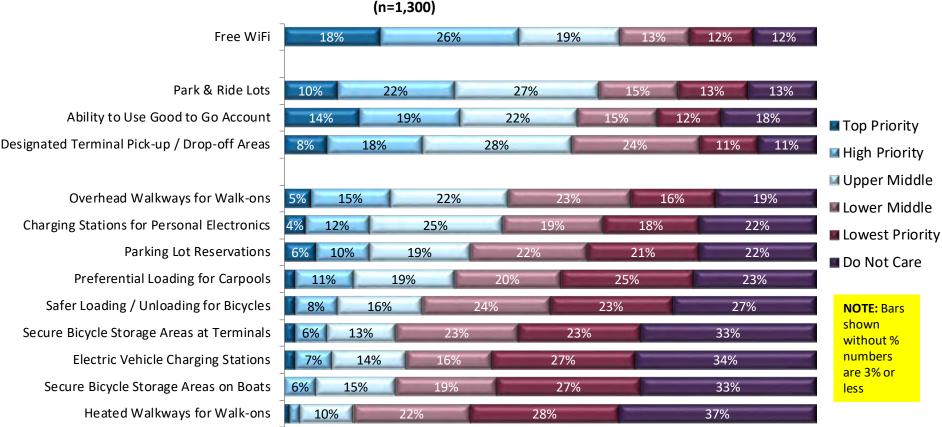
The 5,141 riders ranked thirteen potential amenities from top priority to do not care about it. The top three highest ranked amenities were "free Wi-Fi," "designated terminal pickup / drop-off area," and "park & ride lots." The next group were "ability to use Good to Go account," "overhead walkways for walk-ons," and "charging stations for personal electronics."

Ranking of Potential Amenities - By Average Priority Statewide (n=5,141)



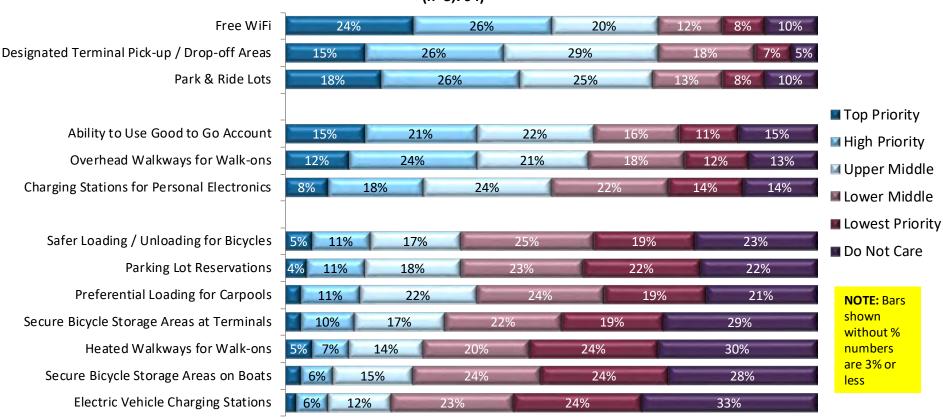
When the amenities are broken out by riders who only drive onto a ferry, the top tier amenity is "free Wi-Fi." Second tier amenities are "park & ride lots," ability to use Good to Go account," and "designated terminal pickup and drop-off areas."

<u>Use Vehicle Only</u> - Ranking of Amenities By Average Priority



The top tier desired amenities for riders who enter a ferry via a vehicle as well as other modes are "free Wi-Fi," "designated terminal pickup / drop-off areas," and "park and ride lots." Second tier amenities are "ability to use Good to Go account," overhead walkways for walk-ons," and "charging stations for personal electronics."

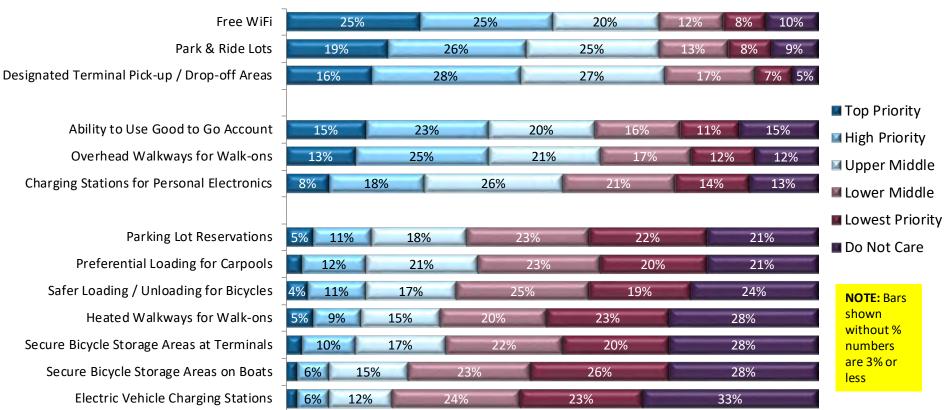
<u>Use Vehicle/Other Modes</u> - Ranking of Amenities By Average Priority (n=3,704)



The top tier desired amenities for walk-on riders are "free Wi-Fi," "park & ride lots," and "designated terminal pickup and drop-off areas." Second tier amenities are "ability to use Good to Go account," "overhead walkways for walk-ons" and "charging stations for personal electronics."

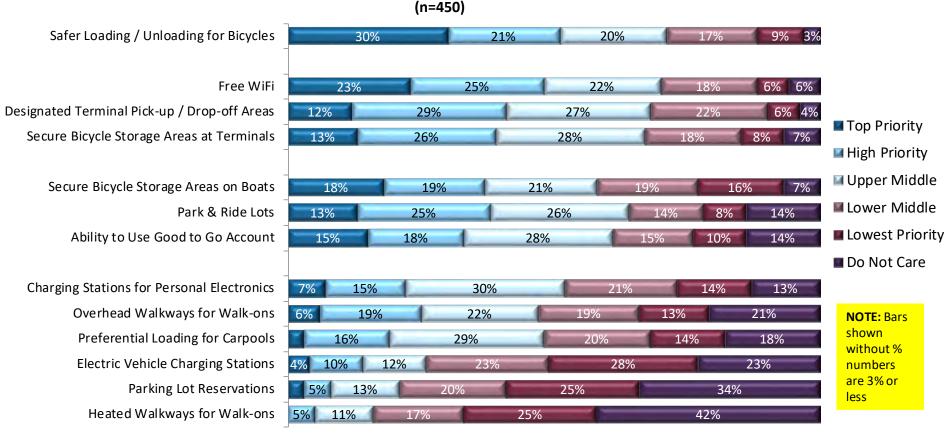
<u>Walkers</u> - Ranking of Amenities By Average Priority





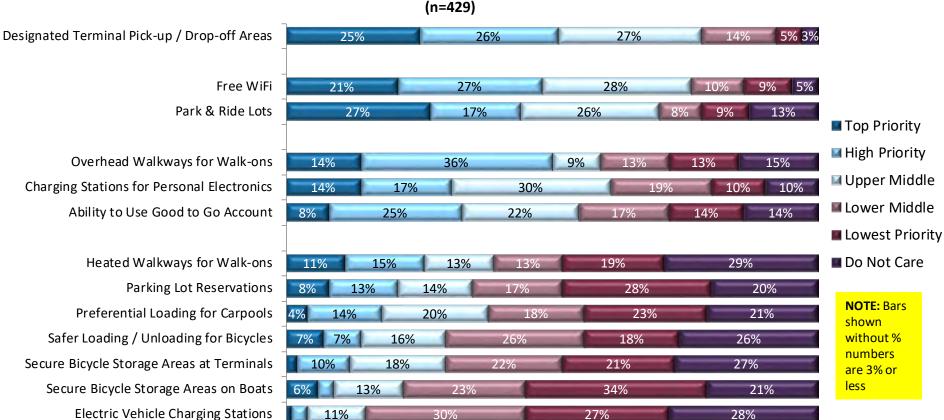
The top tier desired amenity for those bike-on riders is "safer loading / unloading for bicycles." Second tier is "free Wi-Fi," "designated terminal pickup and drop-off areas," and "secure bicycle storage areas at terminal." Third tier amenities are "secure bicycle storage areas on boats," "park and ride lots," and "ability to use Good to Go account."

Bike Riders - Ranking of Amenities By Average Priority



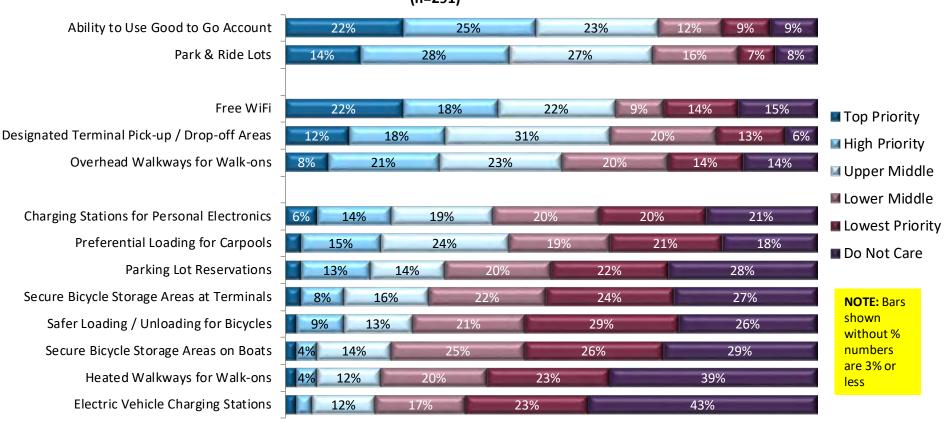
The top tier desired amenity for those transit riders is "designated terminal pickup / drop-off areas." Second tier amenities are "free Wi-Fi" and "park & ride lots." Third tier amenities are "overhead walkways for walk-ons," "charging stations for personal electronics," and "ability to use Good to Go account."

<u>Transit Riders</u> - Ranking of Amenities By Average Priority



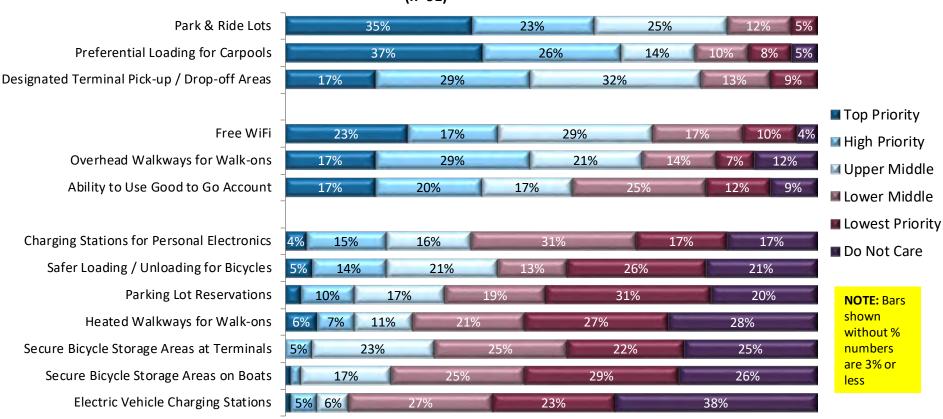
The top tier desired amenities for motorcycle riders were "ability to use Good to Go account" and "park & ride lots." The second tier amenities were "free Wi-Fi," "designated terminal pick-up and drop off areas," and "overhead walkways for walk-ons."

<u>Motorcycle</u> - Ranking of Amenities By Average Priority (n=291)



The top tier desired amenities for driving on ferries in Vanpool / Carpool were "park & ride lots," "preferential loading for carpools," and "designated terminal pickup and drop off areas." The second tier amenities included "free Wi-Fi," "overhead walkways for walk-ons," and "ability to use Good to Go accounts."

<u>Carpool</u> - Ranking of Amenities By Average Priority (n=91)

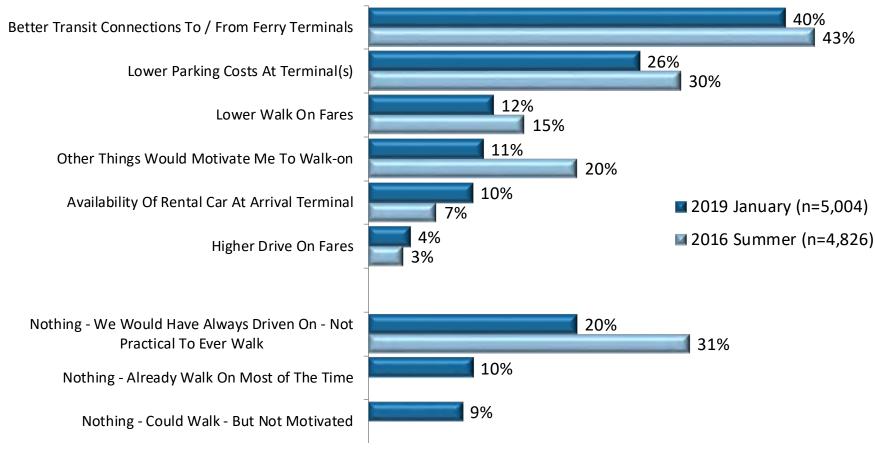




Five Items' Encouragement of Walk-on Behavior

Better transit connections to and from ferry terminals was the top mentioned method of encouraging walk-ons by respondents both in 2019 and in 2016 when the question was first asked. Similar to 2016, the second most mentioned encouragement for walking on was "lower parking costs at terminal(s)."

Encourage Walk-on Behavior – From General List of Options



Q15 What, if anything, would encourage you to walk on rather than drive on?



More likely to walk onto the ferry if ...

The general pick-up and drop-off areas at terminals were improved?

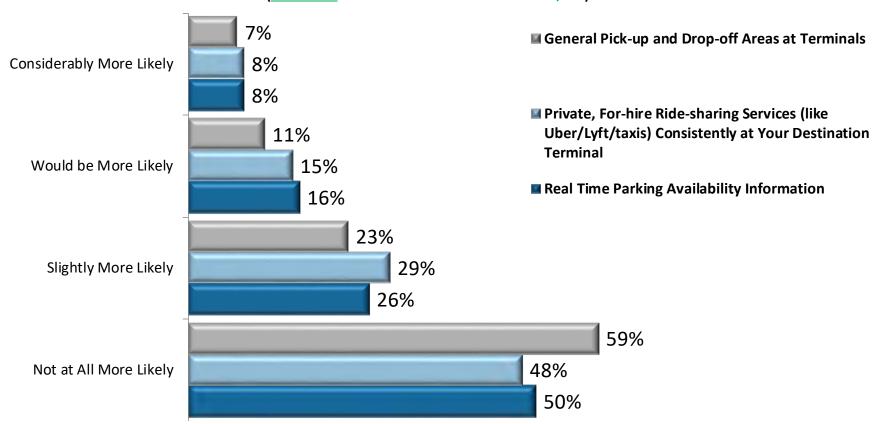
There was **ride-sharing services** (like Uber/Lyft/taxis) consistently at your destination terminal?

There was real time parking availability information?

Having private, for-hire ride-share services consistently at your destination terminal and real time parking availability information made about half of all riders who drive a vehicle onto the ferries more likely to consider walking on.

Encourage Walk-on Behavior By Improving/Providing...

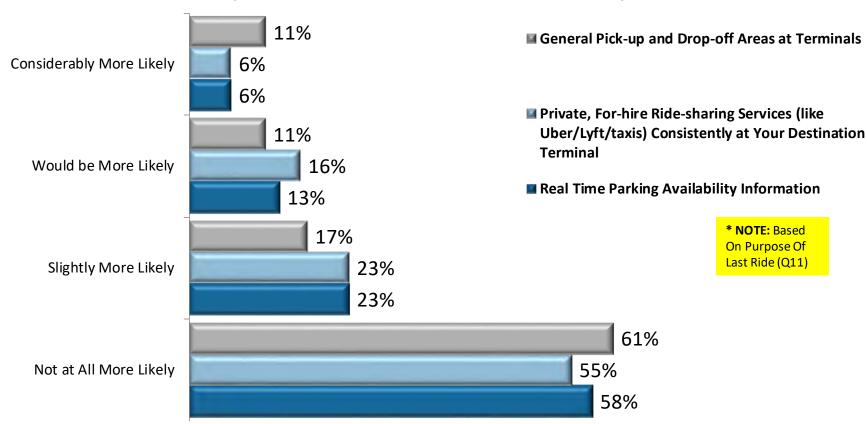
(All Riders Who Drove On at Least Once n=5,004)



Commuter riders who drove on at least once are less likely to be encouraged to walk-on than the general ridership, particularly for "private for-hire ride-sharing services consistently at your destination terminal" and "real time parking availability information."

Encourage Walk-on Behavior By Improving/Providing...

(All Commuter Riders* Who Drove On at Least Once n=963)

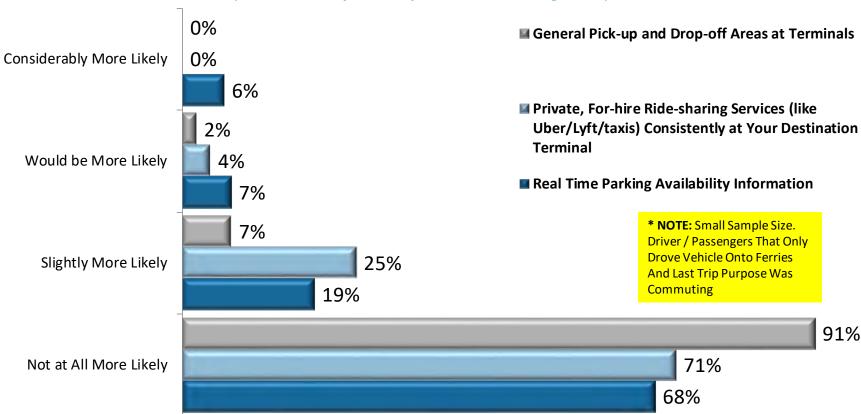


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Encouragement was lower for all three aspects for commuters who only drive on. Of the three methods, general pickup and drop off areas at terminals would not encourage any walk-on behavior.

Encourage Walk-on Behavior By Improving / Providing ...

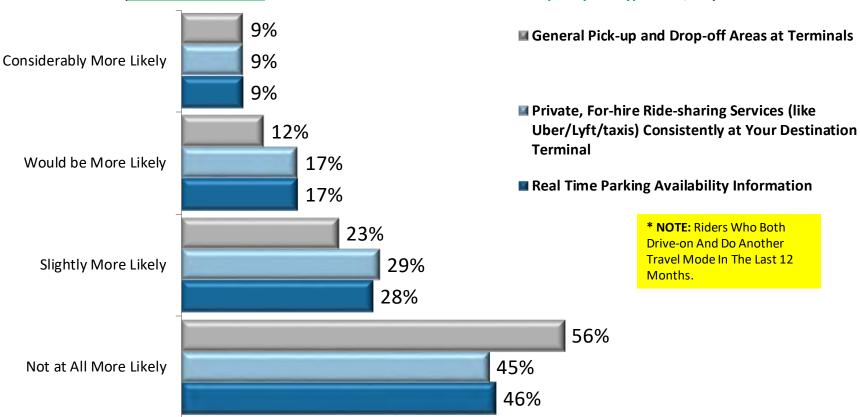
(Use Vehicle Only – Last Trip Was For Commuting N=95*)



Riders who use multiple modes of transportation on Ferries are more encouraged than average by all three options. For-hire ride share (55%) and real time parking availability information (54%) encouraged mixed mode users the most.

Encourage Walk-on Behavior By Improving / Providing ...

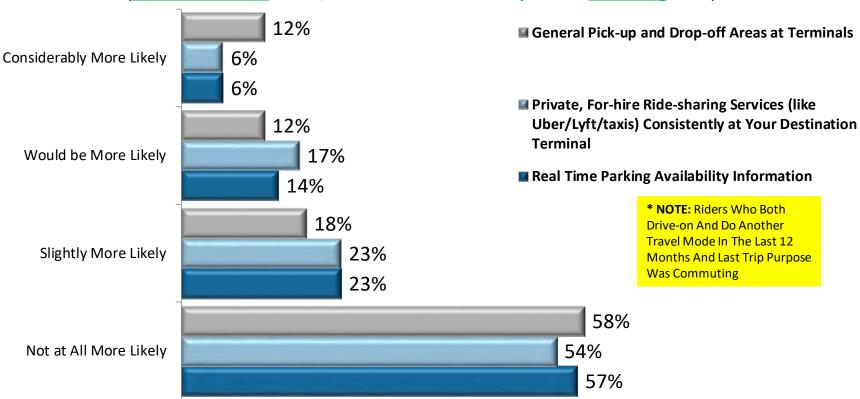
(Multi-modal - Mixed Vehicle & Other Modes Used* - For All Trip Purpose Types n=3,704)



Approximately four in ten of those commuters that drive on as well as some other mode would be encouraged to walk-on more for any one of the three aspects. This group had a higher likelihood of walking on for the general pickup and drop off areas at terminals aspect.

Encourage Walk-on Behavior By Improving/Providing...

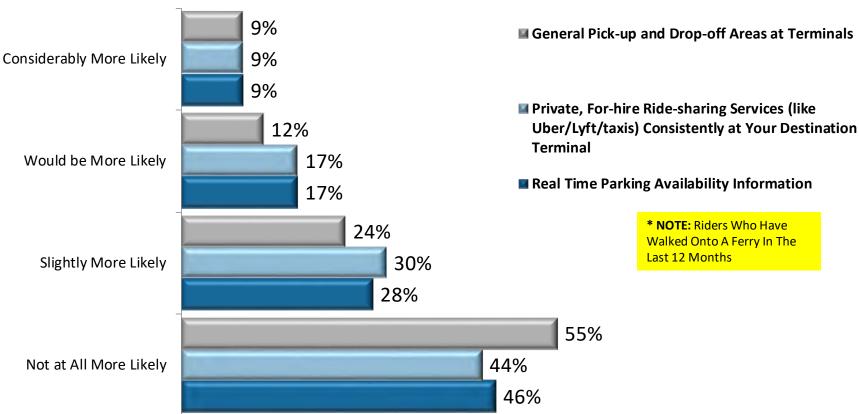
(Multi-modal - Mixed Vehicle/Other Modes Used* - Last Trip Was For Commuting n=868)



Walk-on riders are more encouraged to continue walking on if improvements are made in for-hire ride-sharing (56%) and real time parking availability information (54%).

Encourage Walk-on Behavior By Improving / Providing ...

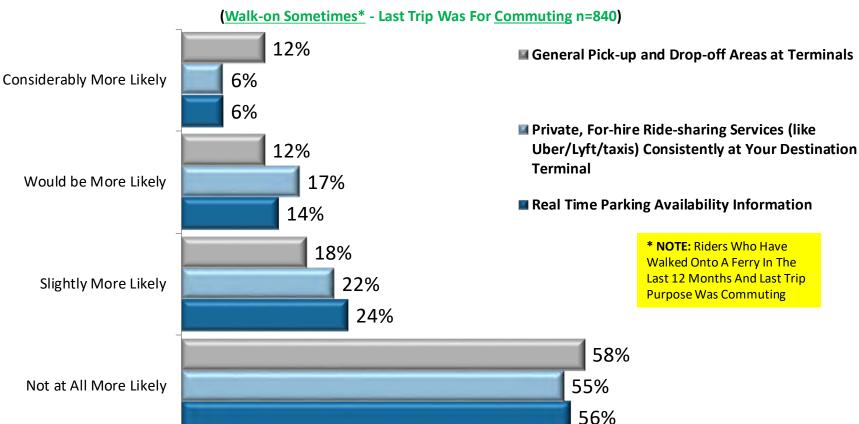
(Walk-on Sometimes* - For All Trip Purpose Types n=3,983)



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Walk-on riders whose last ride was for commuting purposes are less encouraged by all three options than those that walk-on for any purpose. All three options encouraged about four in ten walk-on commuter riders.

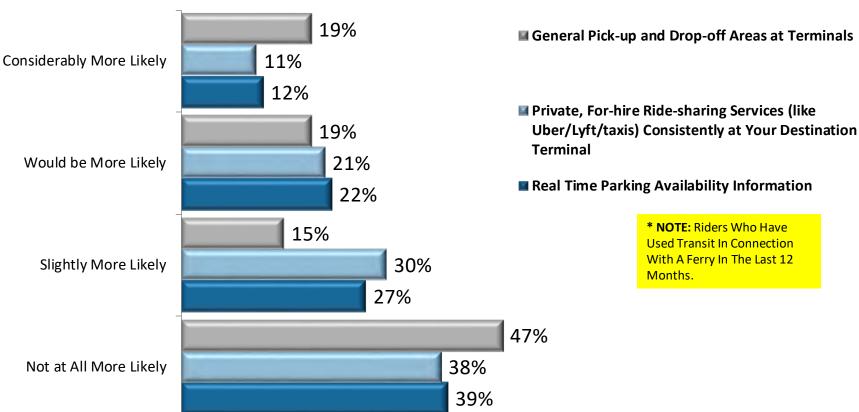
Encourage Walk-on Behavior By Improving / Providing ...



Over six in ten transit users are encouraged by the for-hire ride sharing option (62%) and real time parking availability information (61%) to walk-on.

Encourage Walk-on Behavior By Improving / Providing ...

(<u>Use Transit Sometimes*</u> – For All Trip Purpose Types n=422)

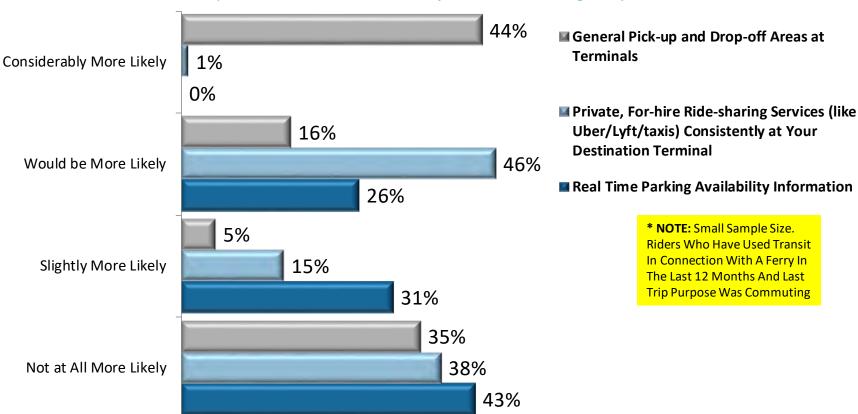




Even with a small sample size the data would suggest that all three options would encourage walk-on behavior for those riders who use transit in combination with ferries to commute to work.

Encourage Walk-on Behavior By Improving / Providing ...

Use Transit Sometimes* – Last Trip Was For Commuting n=82



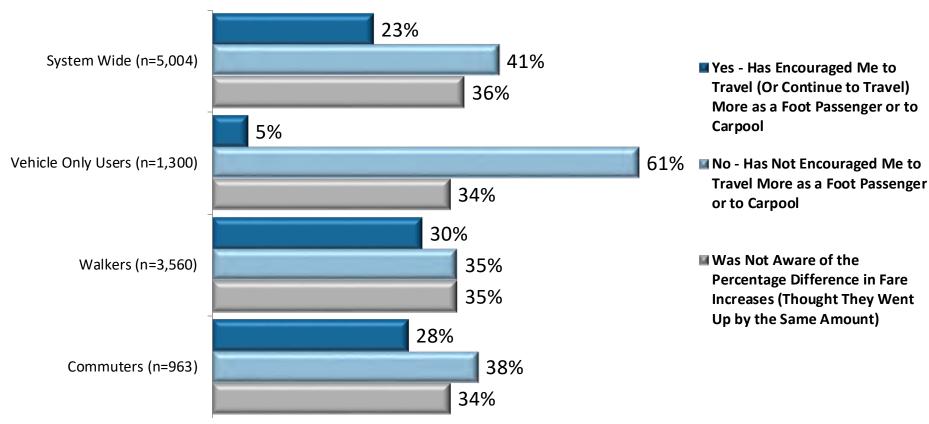


Impact of Lower Passenger to Vehicle Increase Fare Percentage

Methods For Encouraging Walk-on Behavior

One in four riders systemwide feel the impact of a lower passenger to vehicle increase fare percentage has encouraged walk-on behavior. In comparison 5% of riders who only drive on said it did while three in ten walkers and commuters said it did. About one in three systemwide, and in each group, were not aware of the percentage difference in fare increases.

Impact of Lower Passenger to Vehicle Increase Fare Percentage on Encouraging Walk-on Behavior



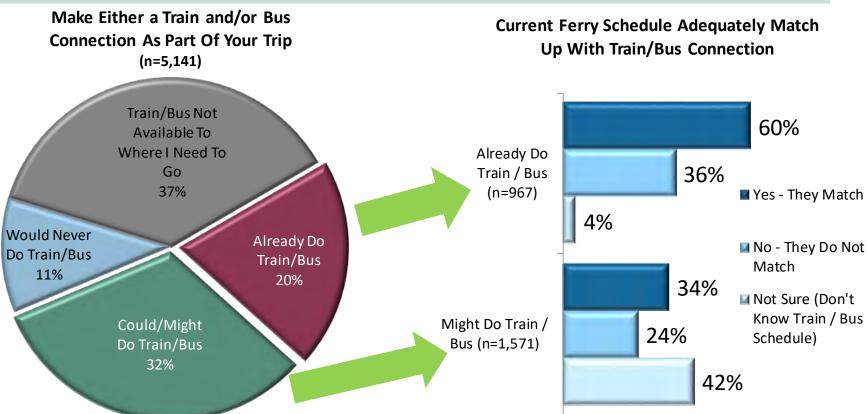
Q19 Over the past few years, passenger fares have been going up at a lower rate than vehicle fares. Has this <u>encouraged you, or not</u>, to travel more as a foot passenger or to carpool?



Current Ferry Schedule Adequately Match Up With Train/Bus Connections

Methods For Encouraging Walk-on Behavior

About half of all riders (52%) use or could use a train / bus in combination with the ferries. Over four in ten (41%) of those that already do use a train / bus do not feel the schedule adequately matches up with their train / bus connection (37%) or are unsure (4%). In comparison, 66% of those that might do a train / bus either feel it does not match up (24%) or are unsure (42%).



Q20 Do you or could you make either a train and/or bus connection as part of your trip on the ferry? Would you say: 1) Already Do Train/Bus Today As Part Of My Ferry Travel, 2) Could/Might Do Train/Bus in The Future As Part Of My Ferry Travel, 3) I Would Never Do Train/Bus As Part Of My Ferry Travel (But It Is Available), or 4) Can't Do Train/Bus As They Are Not Available To Where I Need To Go? Q21 Does the current ferry schedule (departures/arrivals) on the route you take most often adequately match up with your needed (or potentially needed) train or bus connection?



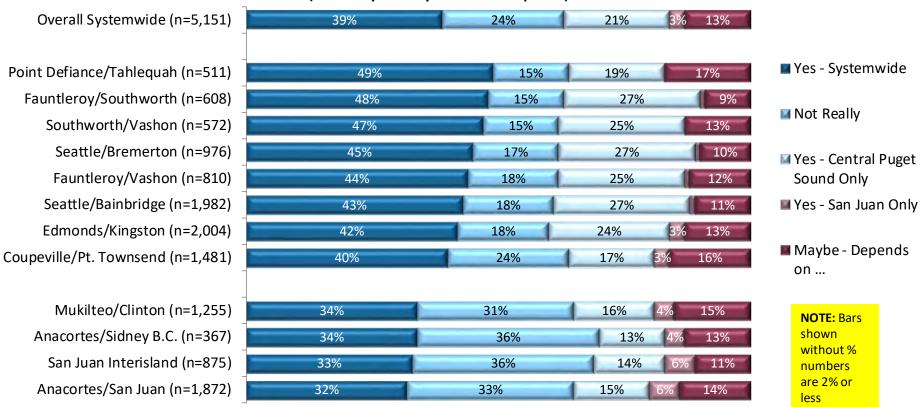
Passenger Only Ferry Service

Passenger Only Ferry Service

When asked if they would like to see passenger only ferry service expanded, four in ten (39%) say "yes and that it should be systemwide." Systemwide desire is highest in the Point Defiance/Tahlequah (49%), Fauntleroy/Southworth (48%), and Southworth/Vashon routes (47%). Yes for just central Puget Sound is highest among riders on Fauntleroy/Southworth (27%), Seattle/Bremerton (27%), and Seattle/Bainbridge (27%).

Expand Passenger Only Ferry Service

(Sorted by Yes – Systemwide Response)

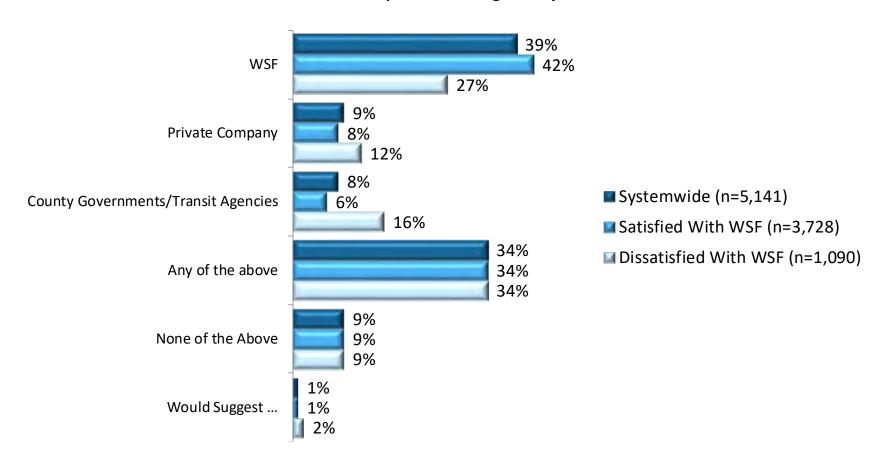


Q22 Would you like to see passenger only ferry service expanded throughout the Puget Sound (including the in San Juans)?

Passenger Only Ferry Service

Four in ten (39%) say they would want WSF to operate the fleet of passenger only vessels. Those dissatisfied with WSF were more likely to mention "County Government / Transit Agencies (16%) than those satisfied with WSF (6%).

Most Want To Operate Passenger Only Vessels



Q23 If a fleet of passenger only vessels were added to the routes that you typically use, who would you most want to operate them?

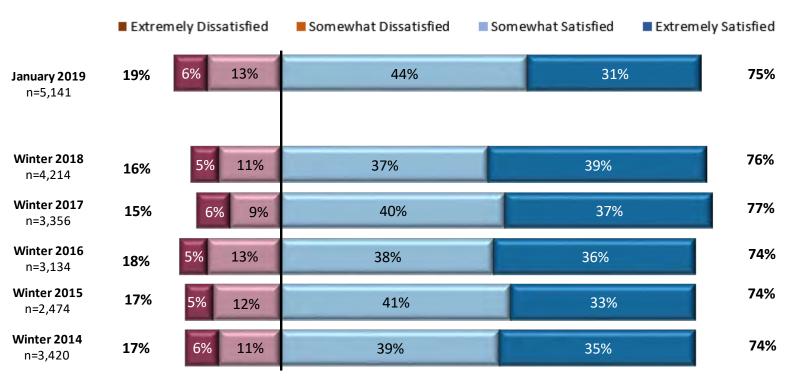


Satisfaction With WSF

Satisfaction With WSF

Overall satisfaction (75%) with the service provided by WSF is strong (44% Satisfied / 31% Extremely Satisfied) and is consistent with Winter 2018. Dissatisfaction increased 3 percentage points in 2019 to 19%, with slightly more extremely dissatisfied (+1% point) and somewhat dissatisfied (+2% points).

Overall Satisfaction with WSF



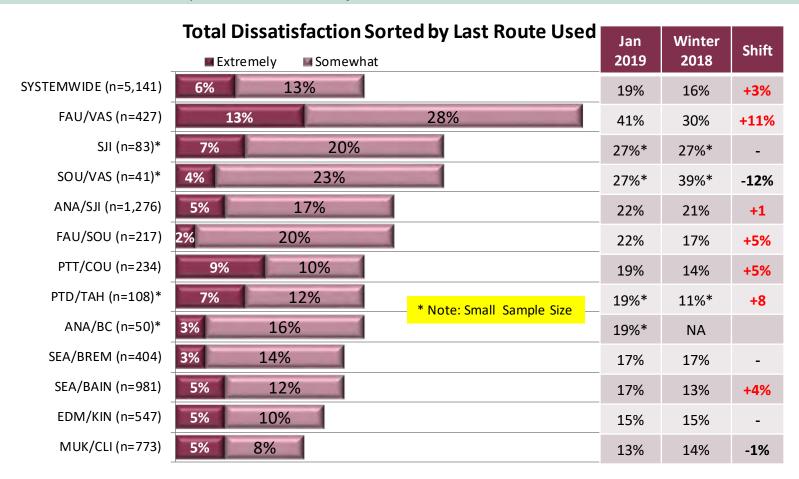
Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown, Ratings of 3 or don't know are not shown.

The **bold** percentages represent the corresponding total dissatisfaction/satisfaction

Q7 All things considered, how satisfied are you with the service provided by Washington State Ferries?

Satisfaction With WSF

Riders on the Fauntleroy/Vashon route saw the greatest negative increase in dissatisfaction (11% point raise) of those routes with large samples. Fauntleroy/Southworth and Port Townsend/Coupeville both had a negative 5% point raise in dissatisfaction over winter 2018 scores.



Q7 All things considered, how satisfied are you with the service provided by Washington State Ferries (by last route ridden Q10)?

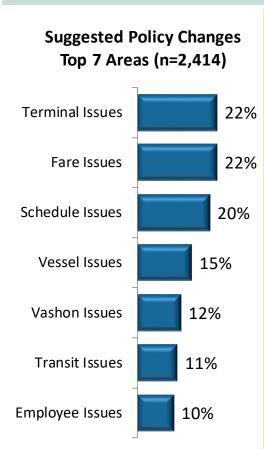


Additional Policy Changes and Comments

Additional Policy Changes



Four in ten (41%) of all respondents gave some sort of suggestion on WSF policy changes they would like to see. The recommendations were split evenly between Terminal Issues (22%), Fare Issues (22%) and Schedule Issues (20%).



Example comments included:

- WSDOT does not seem to like coordinating with local transit agencies much local agencies seem to be the only ones adjusting their schedules to meet the WSDOT vessels.
- I've seen too many instances of people (in cars) cutting in ferry lines and the toll booth employees have no authority to have those people removed from lines.
- The Triangle route between Fauntleroy/Vashon/Southworth is clearly broken. There needs to be ways of loading faster (Good 2 Go, ticket bypass lane).
- Better coordination with light rail options are badly needed if you want to get people out of their cars. Also, there are NO parking options at Mukilteo; this is a terrible situation.
- Charge higher fares, build more ferries, add weekend service for passenger-only ferries, increase service hours on all routes.
- I understand WSF desire to make car fees higher and encourage walk-ons, but the car fees are far too expensive. Tourists should be charged a higher fee and non-commuters pay a surcharge.
- More finely divided fares according to vehicle length, to greater advantage smaller cars and trucks
- Discount for Whidbey Island residents. Cheaper parking monthly. Lower ferry fare. Passes that cover the whole month. Accurate wait times. Automated ticket booths so catching the ferry isn't dependent on how talkative the booth person is. More sailing to Whidbey and larger boats.
- I would expand the fleet by six new ferries to allow rotation of vessels for routine maintenance without causing disruption of ferry schedules. Two of the new ferries should be allocated as Stand by one to the San Juan Islands and one to Puget Sound so ferries do not have to be moved around and disrupt normal schedules.
- There needs to be more crossings per day to keep the waiting lines down.
- Better loading at Fauntleroy. We need two lanes. One for Vashon and one for Southworth. I realize that this is a challenge due to the narrow roadway. Add additional passenger only between Southworth and downtown.

Q24 What additional <u>suggestion or changes in WSF policy</u> would you like to offer WSF and state decision makers that you think would <u>improve or strengthen the quality of service</u> WSF provides?



THANK YOU! For More Information Contact:

Reema Griffith, WSTC Executive Director Bill Young, Survey Program Project Manager

360.705.7070